

# ORGANIZATION REQUEST FORM

CHECK ONE:

☐ New  
☐ Change  
☐ Inactivate / Delete

FISCAL YEAR : \_\_\_\_ \*\*AGENCY : \_\_\_\_ ORGANIZATION : \_\_\_\_

ORGANIZATION NAME:

ORGANIZATION MANAGER:

FUND: \_\_\_\_

LEVEL INDICATOR : \_\_\_\_

STATUS: \_\_ (A) ACTIVE (I) INACTIVE

ACTIVITY \_\_\_\_

FUNCTION \_\_\_\_

## REPORTING ORGANIZATIONS

ORG 1: \_\_\_\_

ORG 2: \_\_\_\_

ORG 3: \_\_\_\_

ORG 4: \_\_\_\_

ORG 5: \_\_\_\_

ORG 6: \_\_\_\_

ORG 7: \_\_\_\_

ORG 8: \_\_\_\_

ORG 9: \_\_\_\_

ORG 10: \_\_\_\_

ORG 11: \_\_\_\_

ORG 12: \_\_\_\_

APPROPRIATION \_\_\_\_

REPORTING CATEGORY : \_\_\_\_

CASH ACCOUNT \_\_\_\_

ORIGINAL FUND : \_\_\_\_

\*\*RESPONSIBLE AGENCY \_\_\_\_

ORGANIZATION TYPE : \_\_\_\_

LOUISIANA ORGANIZATION \_\_\_\_

REMARKS:

DO NOT WRITE BELOW THIS LINE OSRAP USE ONLY

## BUDGETING ORGANIZATON LEVELS

APPR ORG LEVEL 1 : \_\_\_\_

ALLOT ORG LEVEL 1 : \_\_\_\_

EXP BUDGET ORG LEVEL : \_\_\_\_

REV BUDGET ORG LEVEL : \_\_\_\_

## MISCELLANEOUS INFORMATION

BUYER : \_\_\_\_

INVENTORY IND : \_\_\_\_

APPROVAL : \_\_\_\_

JOB NO SPEND : \_\_\_\_

JOB NO REVENUE : \_\_\_\_

SUB ORG SPEND : \_\_\_\_

SUB ORG REV : \_\_\_\_

EXC BUDG PREP : \_\_\_\_

**\*\* You must complete OSIS form ISF027 if the Responsible Agency # and the header Agency # differ to ensure receipt of BUNDL reports by the Responsible Agency. Failure to do so will result in BUNDL reports being distributed to the header Agency only.**

Prepared By : \_\_\_\_\_

Date : \_\_\_\_\_

Approved By : \_\_\_\_\_

Date : \_\_\_\_\_

Title: \_\_\_\_\_

Office of Statewide Reporting:

Approved By :

Date :

Title :

# ORGANIZATION REQUEST FORM

CHECK ONE:

☐ New  
☐ Change  
☐ Inactivate / Delete

FISCAL YEAR :  1      \*\*AGENCY :  2      ORGANIZATION :  3

ORGANIZATION NAME: 4

ORGANIZATION MANAGER: 5

FUND:  6

LEVEL INDICATOR :  7

STATUS: 8 (A) ACTIVE (I) INACTIVE

ACTIVITY  9

FUNCTION  10

REPORTING ORGANIZATIONS 11

ORG 1:

ORG 2:

ORG 3:

ORG 4:

ORG 5:

ORG 6:

ORG 7:

ORG 8:

ORG 9:

ORG 10:

ORG 11:

ORG 12:

APPROPRIATION 12

REPORTING CATEGORY : 13

CASH ACCOUNT 14

ORIGINAL FUND : 15

\*\*RESPONSIBLE AGENCY 16

ORGANIZATION TYPE : 17

LOUISIANA ORGANIZATION  18

REMARKS: 19

DO NOT WRITE BELOW THIS LINE OSRAP USE ONLY

BUDGETING ORGANIZATON LEVELS

APPR ORG LEVEL 1 :

ALLOT ORG LEVEL 1 :

EXP BUDGET ORG LEVEL :

REV BUDGET ORG LEVEL :

MISCELLANEOUS INFORMATION

BUYER :

INVENTORY IND :

APPROVAL :

JOB NO SPEND :

JOB NO REVENUE :

SUB ORG SPEND :

SUB ORG REV :

EXC BUDG PREP :

**\*\* You must complete OSIS form ISF027 if the Responsible Agency # and the header Agency # differ to ensure receipt of BUNDL reports by the Responsible Agency. Failure to do so will result in BUNDL reports being distributed to the header Agency only.**

Prepared By : \_\_\_\_\_ Date : \_\_\_\_\_

Approved By : \_\_\_\_\_ Date : \_\_\_\_\_ Title: \_\_\_\_\_

Office of Statewide Reporting:

Approved By :

Date :

Title :

The form field description of the Organization Request Form follows:

1. FISCAL YEAR Field length (2). Numeric – required. This is a key field on the ORG2 screen. The last two digits of the applicable fiscal year for the organization code entered.
2. AGENCY Field length (3). Alpha/numeric - required. This is a key field on the ORG2 screen. The agency code to which the organization entered is associated. The code entered must be an existing entry on the Agency (AGC2) screen.
3. ORGANIZATION Field length (4). Alpha/numeric – required. This is a key field on the ORG2 screen. A code that is unique within the agency.

**If deleting a line, STOP HERE. If changing a line, enter only the fields that should be changed. If adding a new line, proceed with instructions 4 through 17.**

4. ORGANIZATION NAME Field length (30). Alpha/numeric – optional. It is required for the initial setup of the organization and when changing the organization name. It is not required for other changes to the organization or its inactivation. The descriptive name for this organization.
5. ORGANIZATION MANAGER Field length (12). Alpha/numeric – optional. This is for informational purposes only. This will show on organization reports.
6. FUND Field length (4). Alpha/numeric – optional. Its required when adding an organization or changing an established organization’s fund. It is not required when only changing other information or inactivating the organization. The code for the fund associated with this organization and agency. The code must be valid on the FUN2 screen. If an original fund is coded on the ORG2, it must be different from the fund coded.
7. LEVEL INDICATOR Field length (2). Numeric - optional . It is required when adding an organization or changing the total number of reporting organizations. It is not required when only changing other fields or inactivation. The number value for the level in which this organization appears on your hierarchy (rollup) tree. For example:

“01” if the organization being defined in this line does not report up to any other organization.

“02” if the organization being defined in this line reports to only one organization above itself.

“03” if the organization being defined in this line reports to two organizations above itself.

If the organization being defined in this line reports to more than three organizations above itself, enter the appropriate level indicator (“04” through “12”). OPB subprograms and budget development expenditure organizations will only roll to appropriated programs.

- |     |                         |  |
|-----|-------------------------|--|
| 8.  | STATUS                  | Field length (1). Alphabetic – optional. It is required when establishing or inactivating the organization. It is not required when only changing other fields. There are two status codes:<br><br><div style="margin-left: 40px;"><b>“A”</b>    used when adding or reactivating this agency/organization combination. An organization must be active for transactions to post against it.<br/><br/><b>“T”</b>    used to inactivate this agency/organization combination. This status prevents transactions from being posted against it.</div>  |
| 9.  | ACTIVITY                | Field length (4). Alpha/numeric – optional. It is required if originally hardcoding an activity to the organization or changing from one activity to another. It is not required when only changing other fields. A code used to capture financial information on a statewide and agency wide basis. If entered, the activity must exist on the ACT2 screen.   |
| 10. | FUNCTION                | Field length (4). Alpha-numeric - optional. It is required when establishing a type 1, 2 or 4 organization associated with a function or when changing the function. It is not required on inactivations or when only changing other fields. Must be a valid entry on FUNC table. Used to capture financial data on a state and/or agency basis.   |
| 11. | REPORTING ORGANIZATIONS | Field length (4). Alpha/numeric - optional. It is required when adding an organization or changing the organization’s reporting organization. It is not required when only changing other fields. Enter the appropriate organization(s) to which this organization reports, as defined by the agency roll up structure. Higher level organizations must exist on the ORG2 screen. For example, if this is a level "4" organization, enter the organization codes for levels "1", "2", and "3" in the ORG1, ORG2, and ORG3 fields.<br><br>The last organization listed must equal the organization entered in the ORGANIZATION field. |
| 12. | APPROPRIATION           | Field length (9). Alpha/numeric - optional. It is required when adding a type 1, 2, or 4 organization or changing the appropriation associated with this organization. It is not required when establishing a type 3 organization or if only changing other fields. The appropriation does not have to exist on the EAP2 table when the organization is established. however, it must exist before financial activity is recorded against the organization.  |
| 13. | REPORTING CATEGORY      | Field length (4). Alpha/numeric - optional. It is required when changing the reporting category field on an existing organization or when establishing the organization with a reporting category hard coded to it. It is not required when only changing other fields or if removing an existing entry in this field. If entered, it must   |

already be established on the RPTG screen.

14.    **CASH ACCOUNT**    Field length (4). Alpha/numeric - optional. It is required when adding an organization whose organization type is "1", "2", or "4" or when changing the organization's cash account. It is not required when only changing other fields or for type 3 organizations. Enter the cash account which will be inferred by the organization code. The cash account being entered must already exist on the BAC2 screen.
15.    **ORIGINAL FUND**    Field length (4). Alpha/numeric - optional. It is required when adding a type 1 organization whose receipts must pass through an original fund or when changing the organization's original fund. It is not required when only changing other fields or when establishing type 2 , 3 or 4 organizations. Enter the original fund which will recognize the revenue before the cash is automatically transferred to the final fund. The original fund cannot be the same as the final fund entered in the FUND field on the ORG2 screen. The fund entered must exist on the FUN2 table. ACTS of the Legislature, Statutes, and the La. Constitution determine whether a fund's revenue must go through the Bond Security and Redemption Fund.
16.    **RESPONSIBLE**       Field length (3). Alpha/numeric - optional. It is required when adding an AGENCY organization or changing the organization's responsible agency. It is not required when only changing other fields. Enter the responsible agency that will receive reports for the organization. If left "blank", it will default to the key agency.
17.    **ORGANIZATION TYPE**    Field length (1). Numeric-required. Enter the number that describes the use of this organization:  
  
                                  "1" Revenue Organization  
                                  "2" Expenditure Organization or Non-ISIS warrant organization  
                                  "3" Program Organization  
                                  "4" Warrant Organization
18.    **LOUISIANA ORGANIZATION**    Field length (5). Alpha/numeric - optional. It is required when changing the Louisiana Organization field on a type 1, 2 or 4 organization or when establishing a type 1, 2 or 4 organization and associating a Louisiana Organization with it. It is not required when only changing other fields, removing the Louisiana Organization from the organization, or type 3 organizations. Enter the Louisiana Organization code which is linked to the organization code for reporting and inquiry purposes. If entered, it must exist on the LORG table.
19.    **REMARKS**           Alpha-numeric - required. Enter an explanation of what you are trying to do and cite the authorization, if applicable. It will not be entered on the ORG2 table.